



# MARKET OUTLOOK

## Apples



SUPPLY

GOOD

QUALITY

GOOD

The Washington State Apple Crop is experiencing strong growth and good supply, with an estimated 2023 crop of 134 million boxes, compared to 110 million this past season. The size profile benefits the foodservice industry, with a peak of 100/113ct and more 125s than 88ct. All varieties, from Red Delicious to Cosmic, have seen substantial gains, resulting in better value and availability throughout the season. Summer 2024 won't bring Granny Smith's prices to Washington like they did recently. The growing conditions have been ideal, and no weather issues have been reported.

**MARKET ALERT**

## Asparagus



SUPPLY

FAIR

QUALITY

FAIR

Asparagus production is limited in all growing regions, with most production in Mexico in southern Baja. Northern Baja is closing due to seasonality, while the Sonora Desert is opening fields in higher elevations. Peru is at 50% of normal volume due to El Niño, and volume will not increase until the north opens fields in 2-3 weeks. Markets are active with less asparagus available.

## Avocados



SUPPLY

GOOD

QUALITY

GOOD

Mexico is the primary source of avocados in the US, with over 99% of its volume coming from the country. Last week, Mexico shipped around 60 million pounds of avocados to the US market, a 10% increase from the previous week. The current US inventory is around 52 million pounds. Harvests in Mexico are strong, with hopes for improvement in size curves. Small fruit (60s and smaller) made up about 50% of the pack out, but moving into higher elevations and harvesting new acreage is providing more volume in 48s and a bit of an increase in 40s and larger. The USDA has not reported on 32/36s due to light volume. Dry matter is 26%-28%, with eating and ripening quality improving each week. Q4 is a great time to promote Mexican avocados, especially small fruit and bagged small fruit.

## Bananas



SUPPLY

GOOD

QUALITY

GOOD

The disruptions in Guatemala are more under control and allowing trucks to pass, resulting in an improved supply chain and a return to its pace.

**MARKET ALERT**

## Beans



SUPPLY

FAIR

QUALITY

GOOD

**Green Beans:** Supplies continue to be a little tight but are expected to improve the second week of November and will be in good supply for the holiday. The market will remain elevated. Hurricanes impacted the growing regions of Georgia and Mexico, resulting in crop losses. Georgia recently experiences a freeze and have lost majority if not all of the crops. Beans are transitioning to Florida. Guatemalan beans are starting to arrive in the market.

**Snow Peas:** Supplies are improving with fair to good quality in the west. Supplies are scarce in the east due to protests in Guatemala, but the situation is expected to improve next week, with roads opening and more containers expected to arrive.

# MARKET OUTLOOK

**MARKET ALERT**

## Berries



SUPPLY

BAD

QUALITY

FAIR

**Blackberries:** **ALERT** Prices for Blackberries are trending down. Supplies are tight but steady. Growers are reporting good quality.

**Blueberries:** **FORCE MAJEURE** Prices for Blueberries are trending slightly down. Growers are still calling Force Majeure. Imports from South America are increasing and that's taking a little pressure off the markets. The market is expected to tighten again in December.

**Raspberries:** Prices for Raspberries are trending up. Supplies are tight but steady. Growers are reporting good quality.

**MARKET ALERT**

## Broccoli



SUPPLY

FAIR

QUALITY

FAIR

**Broccoli:** Supplies are steady with strong demand. Supplies are available from Salinas, Santa Maria, and Mexico. Growers are reporting good yields. Market pricing is steady, and supplies should be good in the next few weeks. Prices will not be escalated this week. (F.O.B. pricing for this week \$14.00 - \$15.00)

**Brocolini:** **ALERT** Supplies continue to be light. Demand has increased. Supplies are expected to be limited for a few weeks. Growers are reporting brown bead and flowering defects. Yields are affected by quality issues. Market pricing continues to be escalated. (F.O.B. pricing for this week \$22.95 - \$25.55)

**MARKET ALERT**

## Brussels Sprouts



SUPPLY

FAIR

QUALITY

FAIR

Supplies are starting to show signs of improvement. Quality is reported as improved. Demand is strong. Market pricing and contracts pricing is expected to remain escalated. Market pricing also seems to show signs of improvements. (F.O.B. pricing for this week \$39.00 - \$41.00)

## Cabbages



SUPPLY

GOOD

QUALITY

GOOD

Supplies are steady with good quality. Growers are reporting better availability. Market pricing has improved. Products are coming from Salinas and Santa Maria. (F.O.B. pricing for this week \$15.00 - \$17.00)

## Cantaloupes



SUPPLY

GOOD

QUALITY

GOOD

Guatemalan cantaloupe production is expected to pick up momentum each week, with a sizing profile leaning more to 9ct. The fruit will not arrive in Florida until Friday. Arizona production has improved after a two-week struggle, moving to healthier fields unaffected by the whitefly virus. Sizing has improved, with some 9s being harvested, but a higher percentage of 12s is common for this time of year. Flexibility of sizing may still be required during loading.

# MARKET OUTLOOK



**MARKET ALERT**

**Carrots**



SUPPLY  
FAIR  
QUALITY  
GOOD

Mexico's carrot region is facing challenges due to water and germination issues, causing crop losses and further complicating the domestic market. California and other regions are also facing weather-related challenges, with jumbos and cellos in low supply. Prorates may be expected, and table carrots may be a good substitute. Tropical storm Hilary disrupted plantings in Imperial Valley & Riverside County, California, and Kern County, California, causing a week delay in planting and reduced yields. Hurricane Idalia's devastation in Georgia has significantly affected carrot farms, potentially impacting January volume.

**Cauliflower**



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies are steady with strong demand. Supplies are available from Salinas, Santa Maria, and Mexico. Growers are reporting good yield. Market pricing has improved, and supplies should continue improving in the next few weeks. Prices will not be escalated. (F.O.B. pricing for this week \$13.00 - \$14.00)

**Celery**



SUPPLY  
GOOD  
QUALITY  
GOOD

Supplies are steady. Quality has improved. Supplies are currently coming from Salinas and Santa Maria. Market pricing will be steady for the next few weeks. Supplies and prices will be steady for the next few weeks. (F.O.B. pricing for this week \$13.00 - \$14.00)

**Citrus**



SUPPLY  
BAD  
QUALITY  
FAIR

**Limes:** Cost continues to be elevated, especially on large fruit. There's a significant price spread across the size spectrum; the lime market is expected to stay escalated. The new bloom has caused a significant pricing gap across the sizing spectrum, with potential record-breaking numbers compared to historical trends in Q4. Extreme heat and humidity have also affected quality and shelf life, leading to low availability. Peak sizing currently consists of small fruit, 230s and 250s, accounting for 70% of total harvested yields. Consider expanding your specification to accommodate crop trends and ensure supply.

**Lemons:** Fruit has started in District 3 (Desert region), with loading in Yuma and Mecca. Supplies are limited and will remain tight until early November. District 1 (Central Valley) will begin operations in mid-November. Because of Mexico's limited availability and 75% choice yield, prices will remain high.

**Oranges:** Navels are expected to begin the second week of November if the fruit meets the required Acid to Brix ratios. Production of packable fruit is slightly down by 5% from last season, with more Choice than Fancy. The late Navel crop is expected to be light industry wide.



# MARKET OUTLOOK

## MARKET ALERT

### Corn



SUPPLY

POOR

QUALITY

FAIR

Prices for Corn are trending up. Supplies out of the East is tightening up. Their planting and production cycle was disrupted due to recent rain events and hurricane activity a few months ago. Production out of the West continues to see tight supplies as production transition to Arizona.

### Cucumbers



SUPPLY

GOOD

QUALITY

GOOD

Prices for Cucumbers are trending down. Production is coming out of Georgia and Mexico. Growers are expecting volumes to trend up over the next couple weeks.

### Garlic



SUPPLY

GOOD

QUALITY

GOOD

Domestic garlic has improved with steady supplies. Quality is good and the price remains elevated.

### Ginger



SUPPLY

FAIR

QUALITY

GOOD

The market for imported ginger is active, and supplies are light.

### Grapes



SUPPLY

FAIR

QUALITY

GOOD

California red seedless grape volumes are declining, but they will be present until November. Green seedless grapes will be available until early December. Peru is shipping and increasing volumes as California's supply decline.

# MARKET OUTLOOK

## Herbs



SUPPLY  
GOOD

QUALITY  
GOOD

The quality of herbs has improved with better weather conditions, and both domestic and imported **Chervil** production continues improving.

**Cilantro:** Supplies are slightly better with fair quality. Market pricing has improved. Supplies are shipping out of Salinas and Santa Maria. Growers are expecting supplies and markets to improve in the next few weeks. (F.O.B. pricing for this week \$15.00 - \$17.00)

## Honeydews



SUPPLY  
FAIR

QUALITY  
GOOD

Honeydews are primarily 6ct, with equal 5s and 8s being harvested at smaller numbers.

## Iceberg



SUPPLY  
GOOD

QUALITY  
GOOD

Supplies are good. Quality has improved. Weights are expected to be better with improved sizing of lettuce heads. Yields are much better. Some growers are harvesting in Huron. The market are expected to remain steady for a few weeks. (F.O.B. pricing for this week \$13.00 - \$14.00)

## Kale



SUPPLY  
GOOD

QUALITY  
GOOD

Supplies are steady with good quality and demand. Supplies should remain steady for a few weeks. Market pricing is steady. (F.O.B. pricing for this week \$11.65 - \$13.65)

## Leaf



SUPPLY  
GOOD

QUALITY  
GOOD

**Green & Red Leaf:** Supplies are steady. Quality is good with irregular sizing, light fringe burn, and some seeder. Markets are expected to remain steady. Growers will be challenged with quality in the coming weeks. Lighter supplies are to be expected in the next few weeks due to the transition from Salinas to Yuma. (Green Leaf F.O.B. pricing for this week \$11.00 - \$12.00)(Red Leaf F.O.B. pricing for this week \$10.00 - \$11.00)

**Romaine:** Supplies continue to be good with good quality with some light cupping. Carton weights are fair. Expect market pricing to remain steady for the next few weeks along with supplies. (Romaine F.O.B. pricing for this week \$11.00 - \$12.00)(Hearts F.O.B. pricing for this week \$15.00 - \$17.00)

**Tender Leaf:** Supplies are good with good demand. Quality is good to fair. Supplies and availability are improving due to better weather. Steady market pricing and supplies are to be expected in the next few weeks. (F.O.B. pricing for this week \$4.75 - \$5.00)

# MARKET OUTLOOK



<p><b>MARKET ALERT</b></p> <p><b>Mushrooms</b></p>  <p><u>SUPPLY</u> FAIR</p> <p><u>QUALITY</u> FAIR</p>	<p>Mushroom supplies are expected to be limited for the next few weeks going into the holidays due to quality issues with raw ingredients in compost. Markets are expected to react to these limited supplies, leading to an escalated price.</p>
<p><b>Onions</b></p>  <p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Quality is good to excellent in all growing regions with steady demand. The market is steady. All colors and sizes are shipping out of the Northwest. Colorado has all colors and sizes available. This will also have an impact on precut.</p>
<p><b>Onions Green</b></p>  <p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Supplies have improved. Current supplies are coming from Mexico. Markets will not be escalated. Expect good quality for the next few weeks. Supplies and quality will improve in the next few weeks. (F.O.B. pricing for this week \$11.00 - \$12.00)</p>
<p><b>Pears</b></p>  <p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>The Pear crop is expected to be of excellent quality, like the Apple Crop. Bartlett Crop is projected to have the same amount as last season, while Bosc is expected to have a larger crop, making prices on 100s and smaller better. Red Pears are expected to peak on 80/90ct, while Anjou's in the Pacific Northwest is down by 20%. Overall, the quality is good with size a profile 80/90/100ct.</p>
<p><b>Peppers Bell</b></p>  <p><u>SUPPLY</u> GOOD</p> <p><u>QUALITY</u> GOOD</p>	<p>Prices for Green, Red and Yellow Bell Peppers are trending down. Production is coming out of California, Georgia, and Mexico. Growers are reporting good quality.</p>
<p><b>MARKET ALERT</b></p> <p><b>Peppers Chili</b></p>  <p><u>SUPPLY</u> POOR</p> <p><u>QUALITY</u> POOR</p>	<p>Prices for Chili Pepper are mixed. Production is coming out of California, Georgia, and Mexico. Production in all areas is facing challenges from hurricane activity and rains during the past month.</p>

# MARKET OUTLOOK

## Pineapples



SUPPLY

GOOD

QUALITY

GOOD

The pineapple volume is strong, with the size curve starting to shift back towards larger size fruit. Please contact your local DC to inquire about any pineapple promos.

## Potatoes



SUPPLY

GOOD

QUALITY

GOOD

Good quality from all growing regions. The market continues to trend down. Yields are up by 8.3% overall from the previous year. This year potato crop is in good condition. Good time to promote potatoes. This will also affect precut.

## Squash



SUPPLY

GOOD

QUALITY

GOOD

Prices for Yellow and Zucchini Squash are trending down. Production is coming out of Georgia and Mexico. Growers are expecting volumes to trend up over the next couple weeks.

## Strawberries



SUPPLY

GOOD

QUALITY

GOOD

Prices for Strawberries are trending up. Production is primarily from Oxnard, Salinas, Santa Maria, and Watsonville, with supplies increasing from Oxnard, stable from Santa Maria, and decreasing from Watsonville and Oxnard.

**MARKET ALERT**

## Tomatoes



SUPPLY

POOR

QUALITY

FAIR

Prices for Tomatoes are trending up. Production is coming out of California, Florida, Georgia, and Mexico. South Florida is expecting to get started in 2 or 3 weeks. Supplies are expected to remain on the tight side until Mexico ramps up in late December or January.

## Watermelons



SUPPLY

GOOD

QUALITY

GOOD

Watermelons are in good supply on seedless and minis, with limited supplies in Florida. Mexico volumes are crossing in Texas and Nogales. The market is slightly trending down.



# MARKET OUTLOOK

## **Produce Category Overview**

The annual transition from Salinas to Yuma is expected to happen in the coming week, which will have an impact on all Green Leaf, Iceberg Lettuce, Romaine Lettuce, Romaine Hearts, Processed Salads, and Baby Tender Leaf items such as Spring Mix, Baby Arugula, and Baby Spinach. Once transition start, expect to see several challenges this month.

**Asparagus** are limited in all growing regions but expected to improve in 2-3 weeks. **Blackberries** are escalated with tight supplies due to the weather. **Blueberries (FORCE MAJEURE)** prices are escalated with limited supplies expected to last through late December. **Carrots** are short on jumbo and cello due to weather. **Chili Peppers** remain tight due to the weather. **Green Beans** supplies continue to be limited but expected to improved by the second week of November and will be in good shape for the holiday. **Limes** market is escalated, particularly on large fruit. **Mushrooms** are beginning to get tight leading into the holiday.

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## **FPAA, NatureSweet urge preservation of 2019 Tomato Suspension Agreement**

By **TOM KARST** October 26, 2023

Distributors of Mexican tomatoes are pushing hard to blunt the effort by domestic producers to terminate the 2019 Suspension Agreement between Mexican tomato producers and the U.S. Commerce Department.

The agreement establishes a reference price for Mexican tomatoes.

In September, Michael Schadler, executive vice president of the Florida Tomato Exchange, said there is strong support in the U.S. agricultural community for terminating the Tomato Suspension Agreement and imposing antidumping duties on Mexican tomatoes.

He said over 100 American tomato growers from 13 states have called on the Commerce Department to terminate the Suspension Agreement. This includes tomato growers from Alabama, Arkansas, California, Florida, Georgia, Iowa, Michigan, Minnesota, New Jersey, North Carolina, Pennsylvania, South Carolina and Tennessee.

Termination of the Tomato Suspension Agreement, and the imposition of antidumping duties, will not put any restrictions on the volume of Mexican tomatoes permitted to enter the U.S., Schadler said then.

“Rather, it will only ensure that Mexican tomatoes are sold at fair prices, in accordance with U.S. and international law, as well as the USMCA,” he said in September.

In public comments filed recently, the Fresh Produce Association of the Americas, a group of U.S. distributors of Mexican fresh produce, said the Florida Tomato Exchange provides “no plausible explanation” or factual support for why an antidumping order will do a better job than the 2019 Suspension Agreement to address any alleged problems.

“FTE’s comments are more notable for what they did not address than for the rehash of its weak and unsupported attempt to justify its termination request,” the FPAA said in its filing.

Abandoning the reference price under the 2019 Suspension Agreement and imposing antidumping duties will deprive the U.S. tomato market of vine-ripe tomato varieties that the domestic industry does not produce and will destabilize the U.S. tomato market because of increased volatility in pricing....

[Read full article \*\*HERE\*\*](#)



# MARKET OUTLOOK

## Fall Transition Schedule | 2023 Yuma Season

Grower/Shipper	Current Location	Transitioning	Commodity	Transition Dates	CITY	Transition Dates	CITY
Bengard Ranches	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Green Leaf/Red Leaf	10/9/23	OXNARD, CA	11/13/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Lettuce Romaine	10/4/23	OXNARD, CA	11/15/23	YUMA, AZ
Bengard Ranches	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Cauliflower			11/21/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Iceberg	10/20/23	HURON, CA	11/4/23	YUMA, AZ
Church Brothers	Salinas, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/15/23	YUMA, AZ
Church Brothers	Salinas, CA	Huron, CA	Lettuce Romaine	10/12/23	HURON, CA	11/8/23	YUMA, AZ
Church Brothers	Salinas, CA	Oxnard, CA	Celery			11/6/23	OXNARD, CA
Church Brothers	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Broccoli Crowns			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Cauliflower			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Iceberg			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Green Leaf / Red Leaf			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Lettuce Romaine			11/13/23	YUMA, AZ
Field Fresh Farms	Watsonville, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
Green Gate Fresh	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Broccoli Crowns			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Yuma, AZ	Cauliflower			11/27/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Iceberg	10/16/23	HURON, CA	11/19/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Green Leaf / Red Leaf	10/9/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Huron, CA	Lettuce Romaine	10/5/23	HURON, CA	11/17/23	YUMA, AZ
River Fresh Farms	Salinas, CA	Oxnard, CA	Celery	11/27/23	OXNARD, CA	11/27 - 6/10/24	OXNARD, CA
Taylor Farms - CA	Salinas, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ
The Salad Farm	Hollister, CA	Yuma, AZ	Value Added/Processing Plant			11/13/23	YUMA, AZ

Have you ever wondered what happens during a transition? Click on the video link below to see all of the actions.

Taylor Farms [Video](#)

Church Brothers [Video](#)

If you have any specific questions or concerns on any commodities not mentioned in this report, please feel free to reach out to [dforsythe@nproduce.com](mailto:dforsythe@nproduce.com) and we will be happy to give you those current market conditions. Also look for our Spanish version that will be released on Monday. Have a great week!

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